

# Backlog / Story Grooming

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# Agenda

1. Introduction and Expectations
2. Backlog/Story Grooming
  - a) What is Agile?
  - b) Scrum
  - c) What is a Backlog?
  - d) What is Backlog Grooming?
  - e) Benefits of Backlog/Story Grooming
  - f) Steps / Value Stream Map for Backlog Grooming
  - g) Coarse-Grained vs. Fine-Grained Requirements
  - h) Backlog Grooming Best Practices
3. Conclusion/Q&A

**How much experience do you have with backlog/story grooming?**

**A: Novice/no experience**

**B: Somewhat experienced**

**C: Experienced**

**D: Expert**

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## RefineM

Helping organizations turn their project management capability into a **competitive advantage**



- CEO/Consultant since Dec 2011
  - Agile Transformation /Coaching/Adoption
    - Enterprise Agile Coach @ IBM
    - PMI-ACP One-on-One Coaching
- Project Management/Process Improvement Consulting and Training
- Products for Project Professionals
  - Essential Gear for Project Managers
  - PMP Exam Simulator
  - Online self-paced training videos on Agile Fundamentals, PMP Exam Prep and PDU Bundle
- My professional journey before RefineM – 20+ years of successful project leadership
  - Led hundreds of projects of all sizes
  - Recovered many projects, saved millions of dollars
  - Implemented numerous process improvements
  - Coached/mentored hundreds of PMs and executives
  - Board member – SWMP PMI Chapter (2008 – 2014)

# What's New at RefineM?

Free Webinar	Date
2019 Project Management / Agile Trends	Feb 6
Turn Your Large, Distributed Team into a Smooth-Running Agile Machine	Mar 6

- New Training and Outreach - [RefineM.com/training](http://RefineM.com/training)
  - Several in-person and virtual PMP® and PMI-ACP® classes in 2019
  - New *Web class* – Agile for Waterfall and Operational Work – *January 19, 2019*
  - New *Web class* – Business Requirements Gathering for Agile Projects – *February 7, 2019*
- Agility Assessment – *Assess your team's agility in less than 5 minutes* - [Agility.RefineM.com](http://Agility.RefineM.com)
- PMP Exam Prep Test Simulator - **2-day free trial available now** - [Examprep.RefineM.com](http://Examprep.RefineM.com)
- Agile and Business Requirements Gathering Videos - *Search for RefineM on* [Vimeo.com](http://Vimeo.com)

# What is Agile?

Agile is a capability to respond to change in today's fast-paced business environment.

Agile is based on the four values in the Agile Manifesto and the Twelve Principles.

Scrum, XP, Lean, and Kanban are different Agile methodologies based on Agile values and principles.

# Manifesto for Agile Software Development

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

**Individuals and interactions** over processes and tools

**Working software** over comprehensive documentation

**Customer collaboration** over contract negotiation

**Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

# Agile Twelve Principles

1. **Satisfy the customer** through early and continuous delivery
2. **Welcome changing requirements** even late in development
3. **Deliver working software frequently** (every couple of weeks to every couple months)
4. **Work together daily** (business people and developers)
5. **Motivate individuals**, build projects around them, and give them freedom
6. **Face-to-face conversations** is the most efficient and effective method
7. **Working software** is the primary measure of progress
8. **Development should be sustainable** (i.e. able to maintain a constant pace indefinitely)
9. **Continuous attention** to technical excellence and good design enhance agility
10. **Simplicity** – the art of maximizing the amount of work not done – is essential
11. **Self-organizing teams** deliver the best architectures, requirements, and designs
12. **At regular intervals** the team reflects on how to become more effective

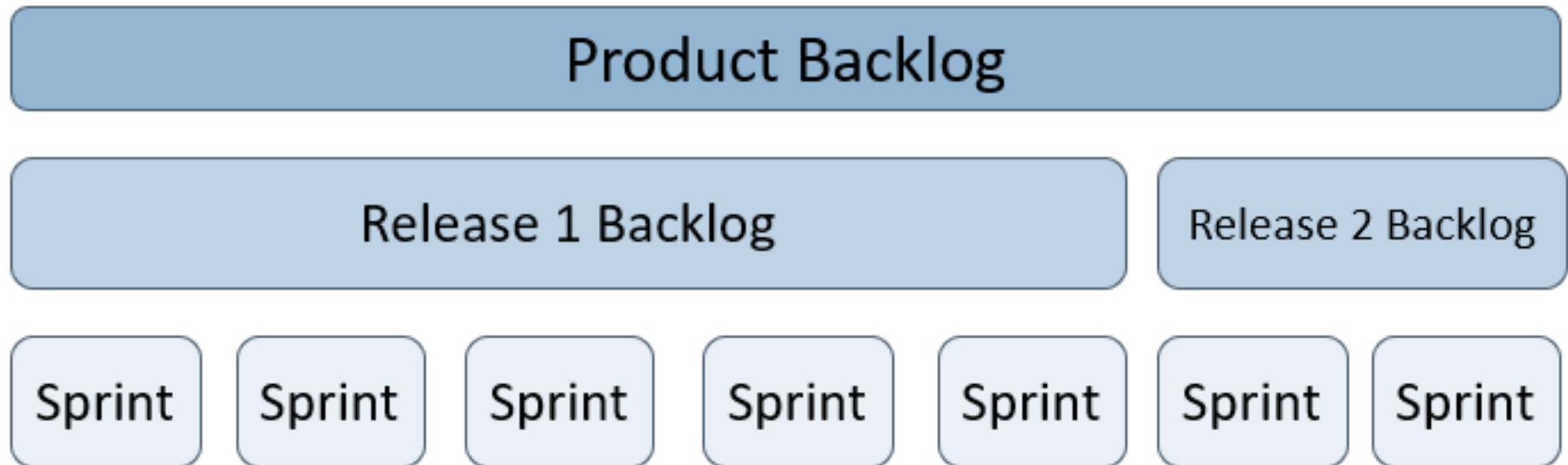
# What is a backlog?

- A list of requirements. . .
- Prioritized by Product Owner with customer and team input
- Crucial to ensure that team focuses on highest-value items
- Broken down to three levels in most Agile / Scrum projects
  - Product Backlog: Highest-level backlog for whole product
  - Release Backlog: Chunk of product backlog to be done in a release
  - Sprint Backlog: Chunk of product backlog for a sprint

# Agile Backlogs

- A Product Backlog contains:
  - **Themes** - very top-level requirements or objectives e.g. A new website
  - **Epics** – very large user stories e.g. A new website section
  - **User Stories** – an Independent, Negotiable, Valuable, Estimable, Small, Testable (“INVEST”) piece of functionality
- As items rise in priority to the top of the product backlog, the Product Owner will work with the team to break Themes and Epics into User Stories.
- Once they break Themes and Epics into User Stories, the Team estimates and commits to delivering stories in the following sprint.
- The Product Owner defines, prioritizes and adds new User Stories to the backlog in preparation for the next sprint – this might include new requirements or changes emerging from the previous sprint.

# Levels of Backlog



# Product Backlog Example

<u>ID</u>	<u>Features / User Stories</u>	<u>Story Points</u>	<u>Priority</u>	<u>Release</u>	<u>Status (Active/Done)</u>	<u>Business Value in \$</u>
CHART-1	Display results in a bar chart.	1	1	1	Done	\$1,000
EXPL-1	Generate explanations of results.	2	2	1	Done	\$2,000
AREA-1	Display success areas.	1	3	1	Done	\$2,500
IMPR-1	Display areas of improvement.	1	4	1	Active	\$2,500
RESC-1	Display resources with results.	1	5	2	Active	\$1,000
EMAIL-1	Display the results in an email.	3	6	2	Active	\$3,000
PDF-1	Offer a PDF version of results.	3	7	2	Active	\$4,000

# Example - VersionOne

The screenshot displays the VersionOne Backlog interface. At the top, there is a navigation bar with 'My Home', a search bar, and tabs for 'Project Sample Product Backlog', 'Product Planner', 'Release', and 'Team'. A 'Reports' icon is visible on the right. Below the navigation bar, the 'Backlog' section is active, featuring a search filter 'Click or start typing', a 'Move-To Project' dropdown, and a table of tasks. The table has columns for 'Title', 'Estimate Pts.', 'Project', 'Detail Estimate Hrs.', and 'Sprint'. There are 7 tasks listed, with the last one highlighted in blue. Navigation controls for the table include '1-7 of 7' and 'Save', 'Cancel', and 'Edit' buttons.

Title	Estimate Pts.	Project	Detail Estimate Hrs.	Sprint
Display results in a bar chart.	6.00	Sample Product Backlog	12.00	Sprint 8/10/2018
Generate explanations of results.	4.00	Sample Product Backlog	8.00	Sprint 8/10/2018
Display Success Areas.	4.00	Sample Product Backlog	8.00	Sprint 8/17/2018
Display Areas of Improvement	4.00	Sample Product Backlog	8.00	Sprint 8/17/2018
Display resources with results.	4.00	Sample Product Backlog	8.00	Sprint 8/17/2018
Send the results in an email.	6.00	Sample Product Backlog	12.00	Sprint 8/24/2018
Offer a PDF version of results.	6.00	Sample Product Backlog	20.00	Sprint 8/24/2018

# Sprint Backlog

- The Sprint Backlog is the list of stories included in the sprint.
- The Scrum team plans to complete this list during the sprint to turn backlog items into deliverable functional increments.
- Sprint Backlog items are estimated in story points or hours.
- The development team updates the Sprint Backlog as items are completed or when new tasks are discovered or adjusted.
- The Sprint Burndown is shown during daily standup meetings so the team has visibility on what is remaining.

# What is backlog grooming?

- Backlog Grooming is the practice of revisiting high-level or “coarse-grained” requirements in the product backlog and adding details so they are ready for the development team.
- The resulting groomed requirements/stories are known as “fine-grained” because they have enough detail for the team to move forward.
- The product owner typically grooms the backlog.

**Who else can groom the backlog?**

# Why is backlog grooming essential?

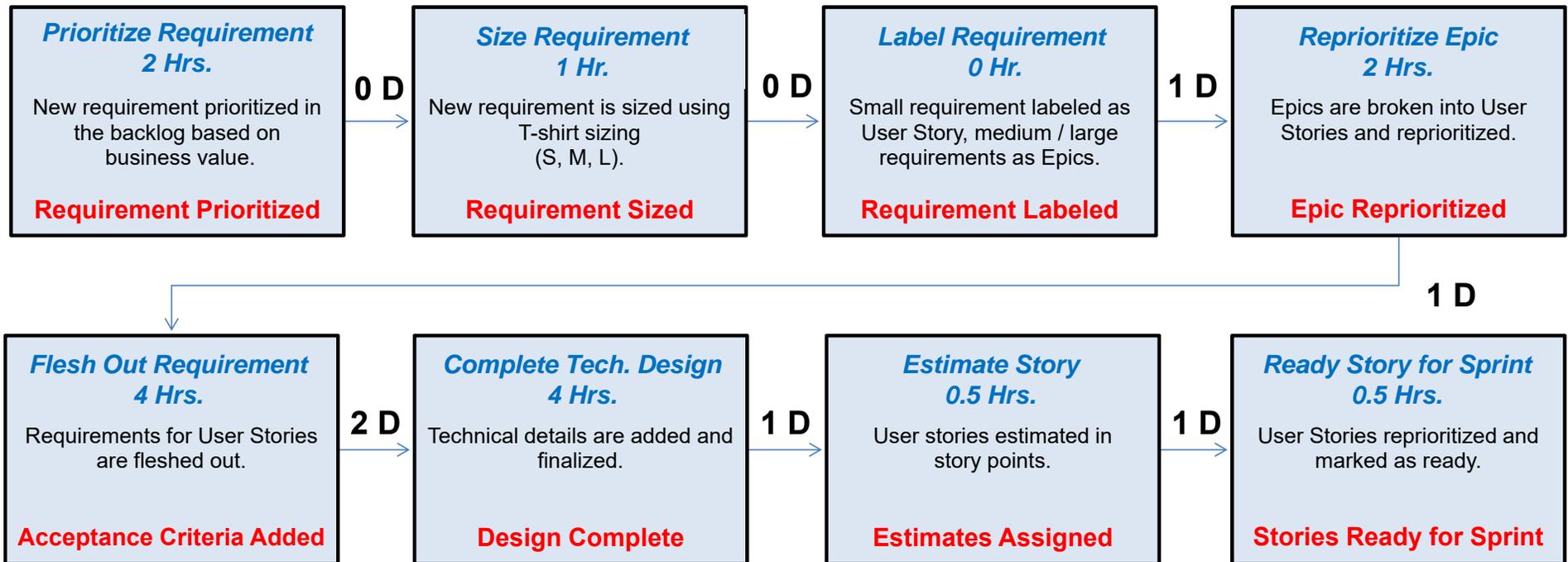
- Without backlog grooming, the team might get stuck during the sprint more often because they have to spend time refining requirements instead of implementing them.
  - They may have to spend more time with the customer in order to understand the requirements.
  - Lack of timely backlog grooming at an appropriate level may skew velocity metrics, making it difficult for the team to gauge their progress toward meeting the sprint goal.
  - Lack of backlog grooming can be a sign of an inexperienced product owner and/or team.

# Benefits of Backlog Grooming/Refinement

- Helps the team stay on top of sprint goals
- Improves productivity by reducing rework
- Keeps velocity tracking consistent for better visibility
- Improves the experience for development team and customer
  - Developers can prepare to build a better product
  - Customers have more flexibility to get their needs fulfilled

**Any others?**

# Steps/Value Stream Map for Backlog Grooming



**Activity Time (AT): 14 hours**  
**Wait Time (WT): 48 hours**  
**Cycle Time (CT): 62 hours**

$$\text{Process Efficiency (PE)} = \text{AT} / \text{CT} = 23\%$$

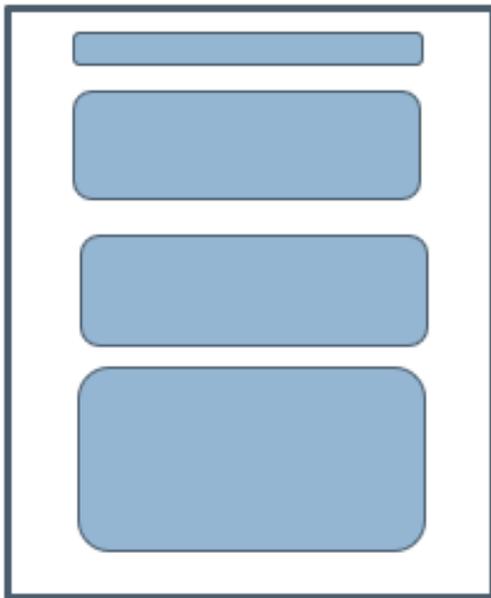
# How to Implement Backlog Grooming

Prioritize Requirement	Size Requirement	Label Requirement	Reprioritize Epic	Flesh Out Requirement	Complete Technical Design	Estimate Story	Ready Story for Sprint
Req.	Req.	Req.	Epic	Story	Story	Story	Story
Req.	Req.	Req.	Epic		Story		
Req.			Story		Story		
			Story				

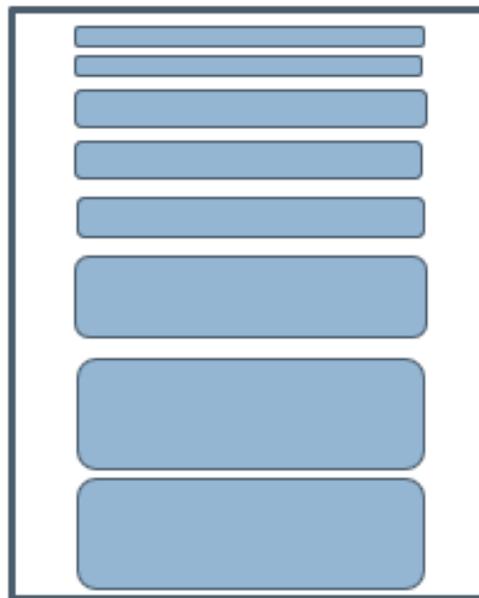
# Coarse-Grained vs Fine-Grained Requirements

Coarse-Grained	Fine-Grained
High-level summary of what needs to be delivered	Low-level details, likely included more of how the requirement is delivered
Likely to receive a higher story estimate such as 20 or above (or XL in t-shirt)	Likely to receive a lower story point estimate such as 8 or 13 (or S, M in t-shirt)
Difficult to assign a time estimate	Easy to assign a time estimate
Likely at the bottom of the product backlog because it is not ready for refinement	Likely at the top of the product backlog because it is ready for refinement

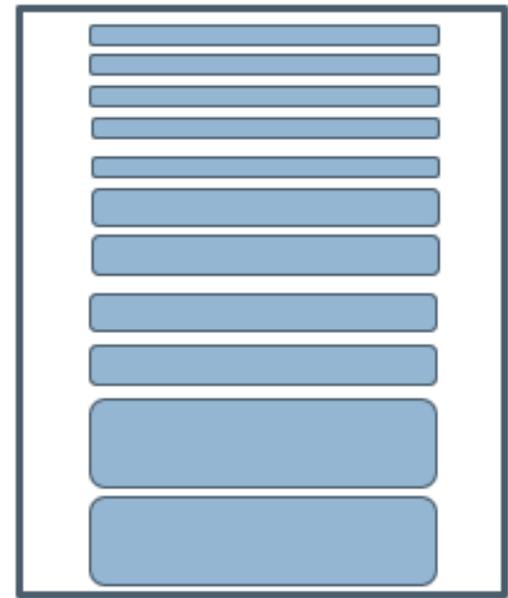
# Coarse-Grained vs Fine-Grained Requirements



**Pre-Grooming**



**1<sup>st</sup> round Grooming**



**2nd round Grooming**

# Grooming/Refinement Best Practices

- PO should work with customer and development team
- Should be done on ongoing basis
- Consider basing priority on one/more of the following:
  1. Business Value
  2. Customer priority: what does the customer want and when?
  3. Cost of delay
  4. Urgency of feedback: how important is the feedback?
  5. Size: time the dev team will take to implement?
  6. How backlog items are related
    - E.g. if A is important for B and C, then do A first
  7. Functionality: What parts are needed to go live?

# How frequently backlog should be groomed?

**A: Continuously/Ongoing**

**B: Before Sprint Planning**

**C: During the Sprint**

**D: Never**

# Conclusion

- Grooming/refinement gives your team greater clarity
- It should be done frequently with customer in mind
- Aim for 2 sprints' worth of groomed stories

**Enable your team's success with Backlog Grooming**

*On-demand recording will be available at [ProjectManagement.com](http://ProjectManagement.com) in 7-10 days.  
Download a copy of the slide deck from [bit.ly/backlog-grooming-slides](http://bit.ly/backlog-grooming-slides)*

# Questions?

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